Learning Facilities

Minister's Symposium on Schools Implementation Plan

Recommendation Subcommittee Reports

Alberta
INFRASTRUCTURE

104-04118/

Learning Facilities

Minister's Symposium on Schools Implementation Plan

Functionality and Utilization "School in the Community" Subcommittee Report

Alberta
INFRASTRUCTURE

School in the Community

SUBCOMMITTEE STAKEHOLDER REPRESENTATION

- Alberta Teachers' Association
- College of Alberta Superintendents (CASS)
- Edmonton Public School District
- Calgary Roman Catholic Separate School District
- Children's Initiative – Calgary
- Alberta School Board Association (ASBA)
- Alberta Children's Services
- Alberta Learning
- Association of School Business Officials of Alberta (ASBOA)
- Alberta Health and Wellness
- Alberta Agriculture, Food and Rural Development
- Alberta Infrastructure

Subcommittee Chair: Sandra Woitas, Edmonton Public School District

External Consultant: David Purdy, Simera Strategy Group

Learning Facilities Branch, Alberta Infrastructure

Project Director: Doug Ramsey, Alberta Infrastructure

School in the Community

EXECUTIVE SUMMARY

The Functionality and Utilization or School in the Community Subcommittee endorsed the integration of services within school facilities where appropriate. Life-long Learning and its inherent expansion of services and programs encourage the integration of services at a centralized site. Therefore as government moves towards the integration of services for better program delivery and the potential costs savings due to adjacencies etc., new school projects and school preservation projects should take into account the potential of expanded programs accommodated in a school facility. This builds on the philosophies and concepts of sustainability of school facilities.

School facilities are the focus of communities and in many rural locations the school facility is the only public building in the community. Combined with the underutilization of some school facilities and declining enrollments the school has become a viable option for the location of integrated services and programs in support of life-long learning and the community. Various programs can benefit through adjacency to clients and other programs to better deliver services.

The subcommittee elected to not identify which programs and partners are appropriate in a school facility. The subcommittee indicated that appropriateness of a partner will vary between communities depending on the needs within the community.

The subcommittee developed a framework for boards to review and develop applications for multi-use facilities accommodating integrated services. One of the major principles put forward by the committee was that there be the political and administrative will at the Ministerial and department level to support cross-ministry programming and capital planning.

In support of integrated services at school facilities the subcommittee makes the following recommendations:

- The Municipal Government Act (MGA) is revised to allow approved integrated services on Reserve Land.
- Government adopt a framework for review of possible public partnering in multi-use facilities that begins at the Ministerial level.
- An administrative cross government initiative is developed for cross-ministry program/capital planning.
- That Alberta Infrastructure, Learning Facilities Branch host the process of integrated service approval through Business Case development and capital plan submissions.

EXECUTIVE SUMMARY (Cont'd)

- Alberta Infrastructure develop criteria that addresses capacity exemptions for approved integrated services in school buildings.
- Government acknowledge and recognize the increased use of school facilities beyond the school day and school year for non-profit community use and that Plant Operation and Maintenance funding needs to reflect this increased use.
- A mechanism be put in place to address the capital and operating needs of approved integrated services currently operating in schools.

School in the Community

INTRODUCTION

At the Minister's Symposium on Schools, there were three decisional questions. The delegates in attendance provided feedback from round table discussions.

- **Decisional Question 1:**
  - What role should the school play when addressing the needs of the community?
  - **Symposium Feedback - Highlights:**
    - A school should serve as the centre of the community and accommodate the needs of learners – life-long learning.
    - A school should allow for flexibility and adaptability to changing needs - evolve with changing demographics and socio-economic factors.
    - A school should result from a planning and design process involving all stakeholders.
    - A school shared with community agencies and government departments should receive shared funding.
- **Decisional Question 2:**
  - To what extent should the government support provision of integrated services and life-long learning to address the needs of the community?
  - **Symposium Feedback - Highlights:**
    - The provincial government should fully endorse integrated services and life-long learning and act as a coordinator, facilitator and promoter to ensure opportunities occur.
    - The provincial government should develop policies and regulations that encourage ministries to integrate services and support life-long learning.
    - Shared use of space means shared responsibility and funding.
    - New and modernized schools should be planned with integrated services, life-long learning and adaptable use in mind.

INTRODUCTION (Cont'd)

- **Decisional Question 3**
  - To what extent should government encourage alternative functional use of school sites to increase utilization?
  - **Symposium Feedback - Highlights:**
    - Government should encourage alternative functional uses of school sites but exercise caution. Alternative uses should only be considered if they support the educational process.
    - Alternative use of school sites should be based on community needs and decisions made with community participation.
    - Provincial legislation should be reviewed to allow for multi-use of school sites.
    - Concern expressed about the amount of reserve land dedicated as school sites that may or may not have a school constructed.
- **Purpose of the Subcommittee:**
- Review the desirability and feasibility of Alberta Infrastructure's role in enhancing the functions of integrated services and life-long learning in school buildings.
- **Mandate of the Subcommittee:**
- Develop criteria to assist Alberta Infrastructure in its response to capital requests that include planning for integrated services and life-long learning.
- **Subcommittee Report:**
- Define "integrated services".
- Define "life-long learning".
- Develop a criteria and framework to be considered when processing capital applications that include the functions of integrated services and life-long learning.

SUBCOMMITTEE DEFINITIONS

For the purposes of this report and the proposed framework, the subcommittee adopted the following definitions:

Definition: *Integrated Services for learning in Alberta Schools**

"A program or service which has several distinct components, each of which may be delivered separately, but when considered together, comprise a complete program or service".
These services include activities that are complementary to Life-long Learning and the purposes of the School Authority.

Definition: *Life-long Learning***

"Life-long learning is the process by which people acquire and apply knowledge and skills throughout life to help them reach employment goals, enjoy a high quality of life, and be active and responsible citizens. Life-long learning begins in early childhood and continues into senior years. Life-long learning enables Albertans to participate and contribute in an ever-changing economy and society."

* Definition from an excerpt of the Freedom of Information and Protection of Privacy Act of Alberta.

**Definition based on the draft definition of Life-long Learning provided by Alberta Learning.

SUBCOMMITTEES PRINCIPLES

1. The primary use of school buildings will be to educate students between kindergarten and grade 12 as defined in the current School Act.
2. Alberta Learning's policy to move toward life-long learning and the expansion of school use beyond the traditional K-12 curriculum is supported by this subcommittee.
3. Alternative uses will be encouraged when they are appropriate partners in support of the K-12 educational process.
4. Alternative uses will also be encouraged when they are appropriate partners (as defined by the community) in support of the Life-long Learning.
5. Integrated services are deemed to be required in the near future if Government agencies are going to provide appropriate programs within Alberta communities. Agency services will provide a benefit based on:
   - Integrated and/or complementary programs.
   - A better delivery point within the community.
   - Better access to clients.
6. Current operating programs deemed to be meeting the intent of being an integrated service supporting life-long learning will receive the same funding opportunities as new programs.
7. Any model approved by government must have an appropriate and sustainable funding formula.
8. Government departments must start working at the Ministerial level to ensure that all possibilities for sharing space in multi-use facilities are explored.

School in the Community

SUBCOMMITTEE OBSERVATIONS

1. Albertans place a high value on local community schools.
2. The "neighbourhood school" is becoming a centre to the larger community that addresses the educational programme and community needs beyond the local neighbourhood.
3. Increasingly school boards are expected to accommodate other programs within their facilities to support life-long learning of all community members.
4. A new way of providing educational services is essential for school boards and communities to address changing curriculum, declining enrolments and community needs. Schools will increasingly become multi-use facilities.
5. Multi-use facilities will help keep schools in communities and provide space for programs in both rural and urban communities. For example a school may be the only government building in a community and it could accommodate a number of agencies to keep them in the community, Agriculture Offices, Children's Services Offices, Health Authority Offices etc.
6. Private for profit programs and tenants should not be excluded from multiple-use facilities, if they meet the intent of observations 1., 2. and 3.
7. The public sector use of the facility should be at the discretion of the school authority and community. (*The Subcommittee adopted the Use of School Reserves Subcommittee redefinition of School Authority.)
8. With societies increasing reliance on a delivery point for a number of services and programs in the community beyond the traditional K to 12 curriculum, the school over the past several years the school facility has become that delivery point for a number of programs. These are sometimes offered on a full time basis from the school or on a part-time basis through visiting professionals.
9. Due to the increased role of the school facility in the community it is a logical location for integrated services. These services may vary from community to community, especially in rural and urban settings. In both rural and urban areas there are many schools with excess space due to declining enrolments. Projections from Alberta Learning show that the student enrolments in Alberta will continue to decline. **See "Attachment A".**

SUBCOMMITTEE OBSERVATIONS (Cont'd)

10. Although some areas of the province are experiencing declining enrolments, other areas are growing and have no local schools facilities.
11. New school facilities and preservation of existing facilities (rightsizing projects and additions) should take into account the trend toward integrated multi-agency facility.

***"School Authority Purposes"** means a use or activity as permitted under the "School Act" and or endorsed by a School Authority, that provides education and non-instructional programs to/for students of a School Authority and includes ancillary uses or activities that are primarily intended to provide life-long learning. (Definition assumes Charter Schools are included under definition of School Authority which are not presently covered under the MGA.)

STEP 1
GOVERNMENT APPROVAL

The success of this initiative is based on the assumption that the Alberta Government and partners support:

- An administrative cross-government initiative that supports cross-ministry program/capital planning.*
- The concept of integrated services supporting life-long learning in schools.
- A collaborative funding model that has potentially numerous public and private funding sources.
- A model whereby Alberta Infrastructure as the host body hosts processing business cases for Integrated Services.
- A more efficient use of all school facilities in Alberta with positive capacity impacts on participating schools.
- The Municipal Government Act (MGA) will be revised to expand the allowable uses on Reserve Land and School Reserve Land. (See Use of School Reserve Report).

GOVERNMENT ASSESSMENT OF PROGRAM NEEDS
MINISTRIES DEVELOP CAPITAL PLANS
PLANS REVIEWED BY MINISTRIES

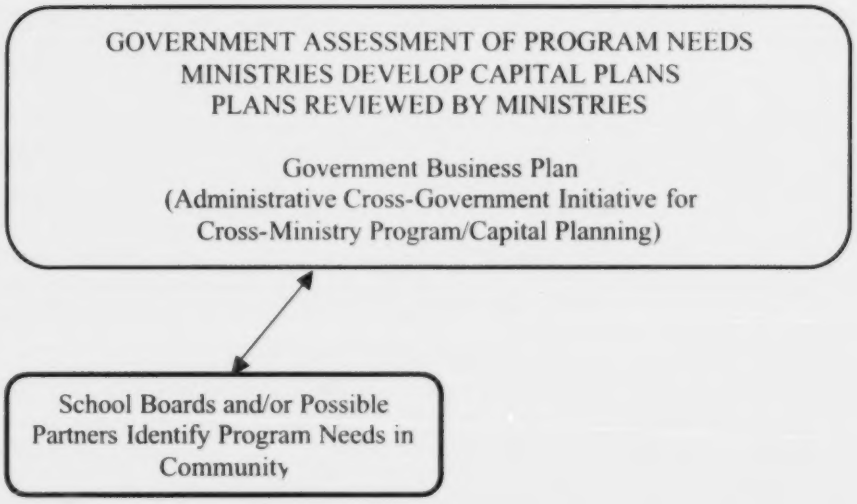
Government Business Plan
(Administrative Cross-Government Initiative for
Cross-Ministry Program/Capital Planning)

The point of approval for Integrated Services is at the Ministry level. A process must be in place whereby the four key areas for program sustainability are evaluated and approved. These areas are:

- Capital Approvals
- Preservation
- Plant Operating And Maintenance
- Program Operating

* Key administrative cross-government initiatives involve cooperation across the Alberta Public Service with a view to promoting efficiency, effectiveness and economy.

STEP 2



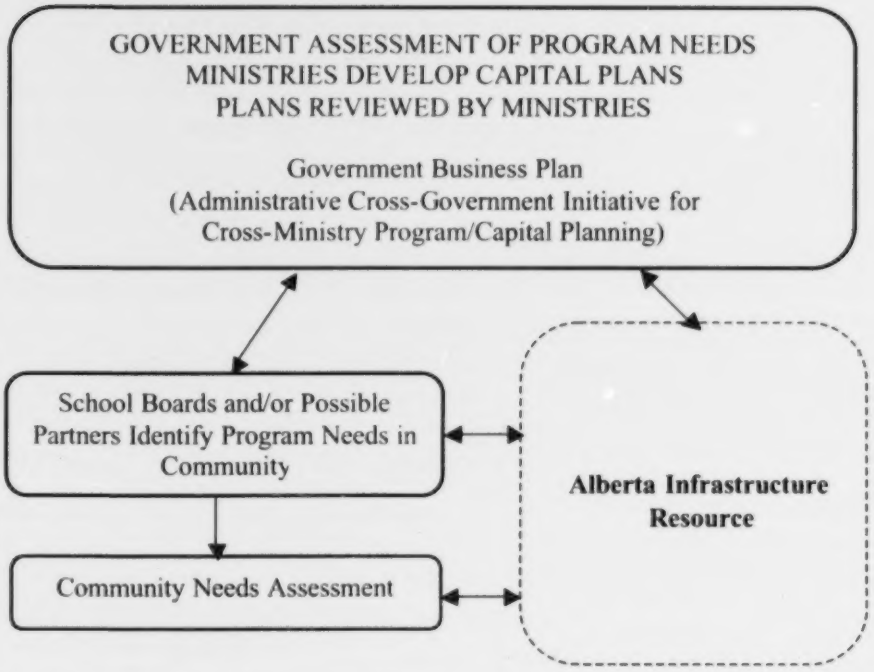
The identification of services needed in the community is initiated at the community level by either the school board or the partners. The school jurisdiction will host this process. (See Planning and Design Subcommittee Framework and Report.)

Planning Cycle

The Planning and Design Recommendation Subcommittee is developing a framework to help boards in the planning and development of projects and the consultation process.

The school board must incorporate the board's education plan and facility plans to ensure that the partners are appropriate to the education plan and the needs of the community.

STEP 3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MINISTRIES DEVELOP CAPITAL PLANS
PLANS REVIEWED BY MINISTRIES
Government Business Plan
(Administrative Cross-Government Initiative for
Cross-Ministry Program/Capital Planning)
School Boards and/or Possible Partners Identify Program Needs in Community
Community Needs Assessment
Alberta Infrastructure Resource

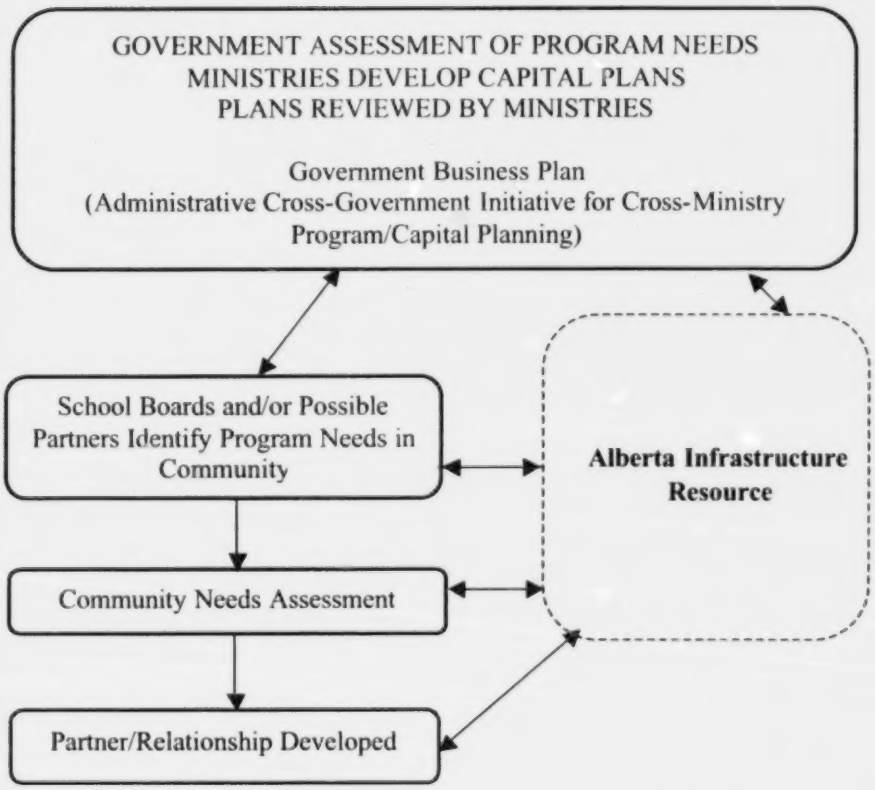
A formal assessment of community needs will be developed. This will include:

- Assessment of Facilities within the community.
- Assessment of the programs required by the community to support life-long learning.
- Assessment of programs or agencies that would discontinue service or program in the community if space is not provided, either new or existing space.

The Alternate Procurement (P3s) Recommendation Subcommittee is developing a framework for public-public partnerships that could be adopted and used in the above framework. (See the Alternative Procurement (P3) Subcommittee report.)

School boards and possible partners must identify the time required to do the community needs assessment and the development of the partnerships. All partners will have to include the project in their capital plans as a comparable priority.

STEP 4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MINISTRIES DEVELOP CAPITAL PLANS
PLANS REVIEWED BY MINISTRIES
Government Business Plan
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School Boards and/or Possible Partners Identify Program Needs in Community
Alberta Infrastructure Resource
Community Needs Assessment
Partner/Relationship Developed

It is anticipated that through this process a cohesive relationship will be developed between community entities that will promote the understanding of all services relating to life-long learning delivery.

The potential partners will begin to identify program requirements and the type of working relationship to be established. The partner will also identify facility requirements.

STEP 5

GOVERNMENT ASSESSMENT OF PROGRAM NEEDS
MINISTRIES DEVELOP CAPITAL PLANS
PLANS REVIEWED BY MINISTRIES
Government Business Plan
(Administrative Cross-Government Initiative for
Cross-Ministry Program/Capital Planning)
School Boards and/or Possible Partners Identify Program Needs in Community
Alberta Infrastructure Resource
Community Needs Assessment
Partner/Relationship Developed
Business Case Analysis

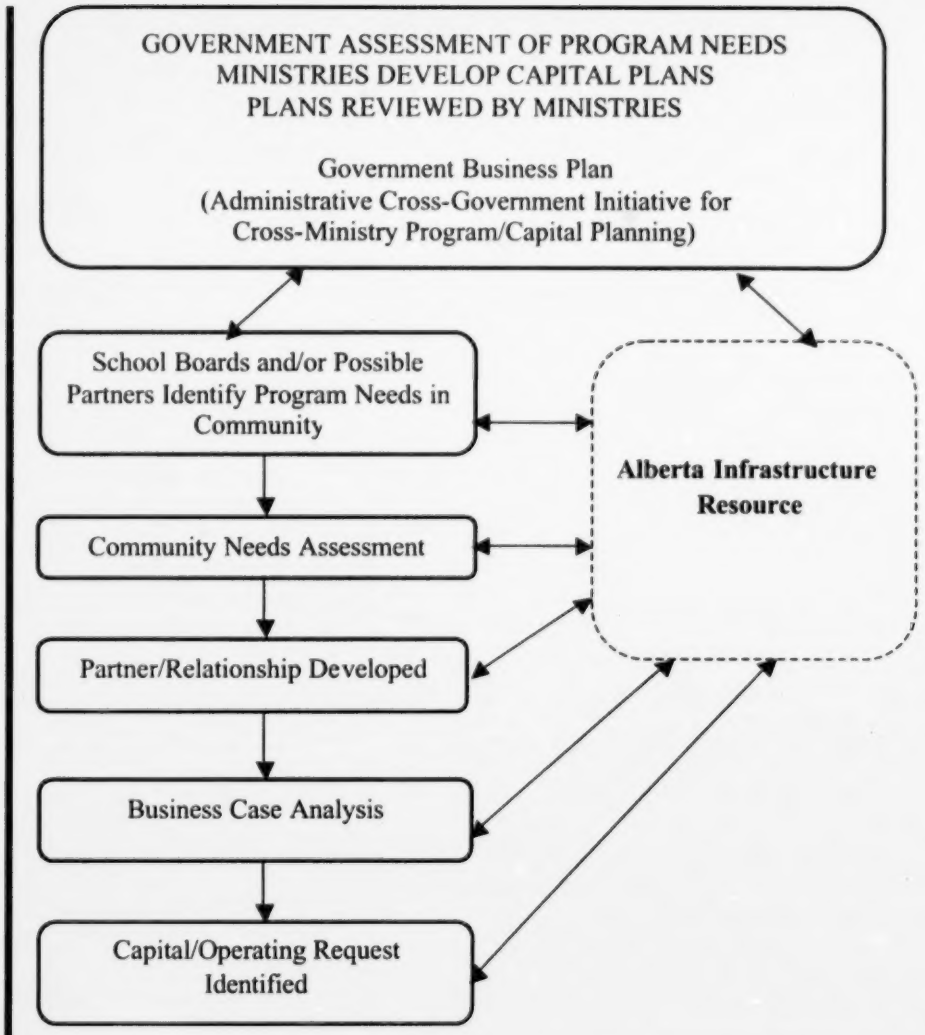
The Community Needs Assessment and partnership/relationship development stages will provide the information needed to develop the Business Case* for the initiative. This will include:

- An Executive Summary
- Background
- Project Description
- Strategic Alignment (if any)
- Environmental Analysis
- Business and Operational Impacts

STEP 5
(Cont'd)

- Project Risk Assessment
- Cost/Benefit Analysis
- Conclusions and Recommendations
- The template for the Business Case can be found on the Alberta Infrastructure web site www.infras.gov.ab.ca.

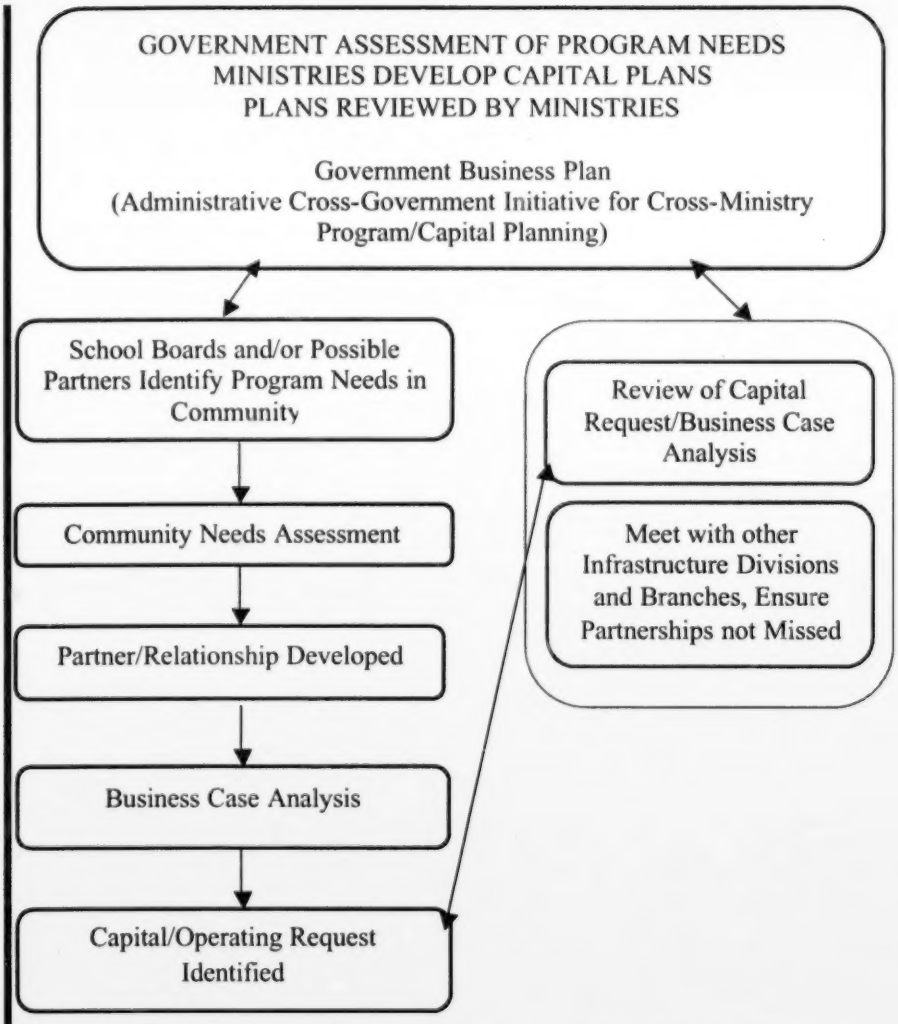
STEP 6



From the Business Case Analysis a capital and operating request will be identified. These needs will be in five distinct areas:

- New Program -- Capital Request
- Modify Existing Program -- Preservation Request
- Building Operating Implications -- P O & M funding
- Program Operating Implications -- Program Funding (By Ministry)
- Other government agencies will include the request for capital in ministry's capital plans with a comparable priority.

STEP 7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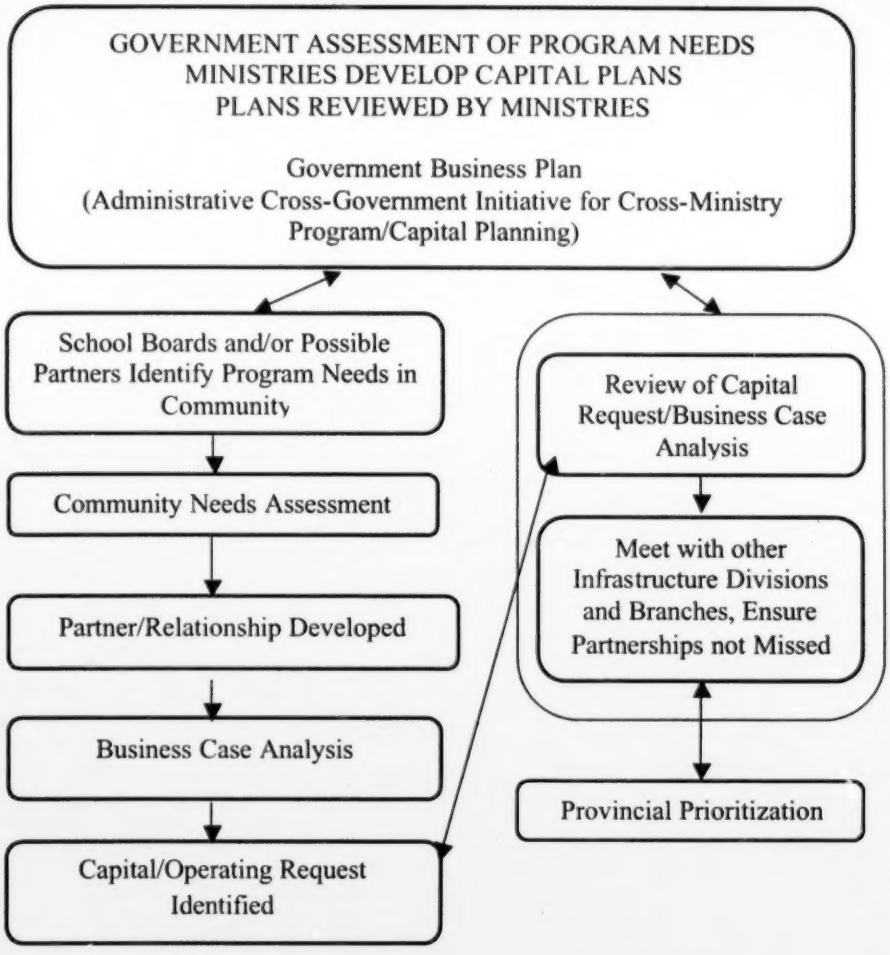
School Boards and/or Possible Partners Identify Program Needs in Community
Community Needs Assessment
Partner/Relationship Developed
Business Case Analysis
Capital/Operating Request Identified
Review of Capital Request/Business Case Analysis
Meet with other Infrastructure Divisions and Branches, Ensure Partnerships not Missed

- All Business Cases will be reviewed as part of the School Capital Submission Process.
- All appropriate ministries will be part of the assessment of the Business Case and the Capital Request.
- The Learning Facilities Branch will apply criteria for capital and operating approvals.

STEP 8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Capital/Operating Request Identified
Review of Capital Request/Business Case Analysis
Meet with other Infrastructure Divisions and Branches, Ensure Partnerships not Missed
Provincial Prioritization

Alberta Infrastructure (with input from other appropriate ministries) will prioritize all projects on a Provincial basis.

Projects with viable business plans will be prioritized in two categories.

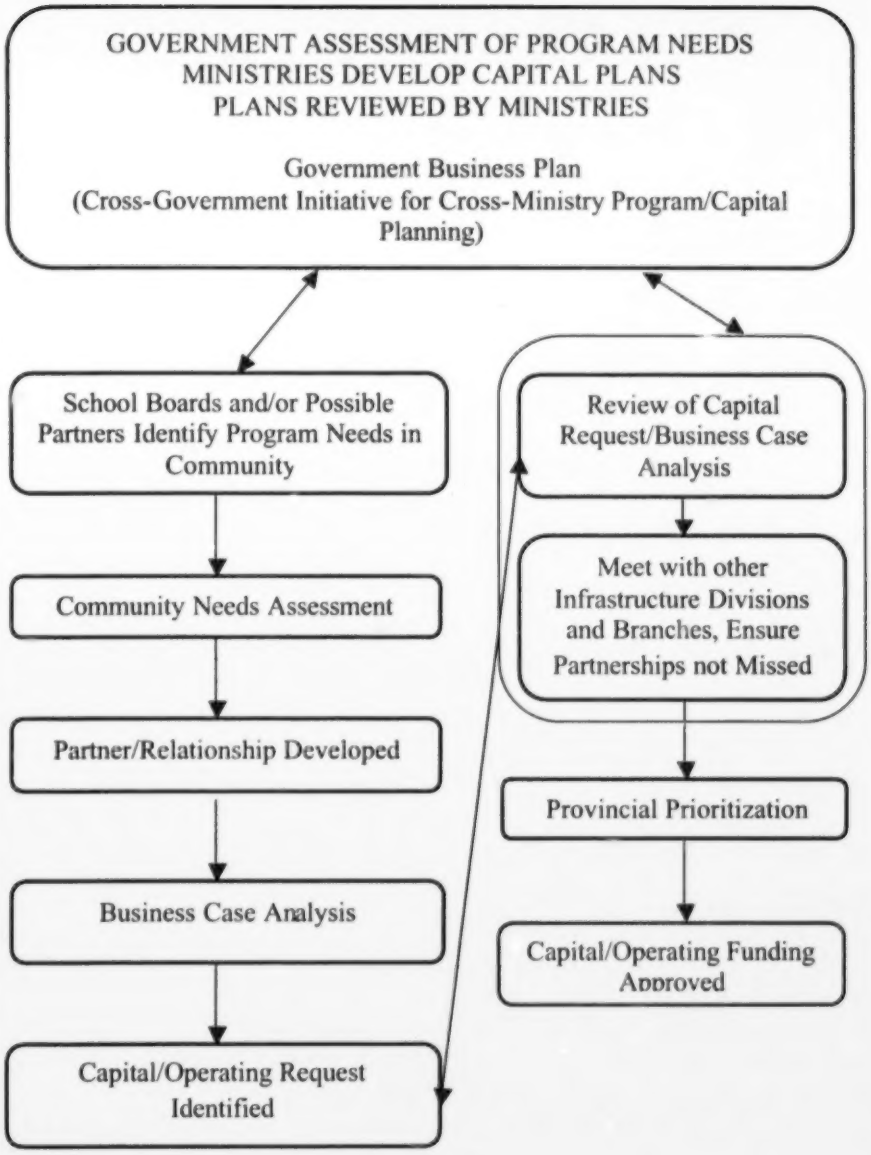
1. New projects:
   The approval of new schools should be on the basis of two principles:
   - i. Geographic sector and jurisdiction utilization and
   - ii. Impact of proposed integrated services on the community.

STEP 8
(Cont'd)

2. Existing schools:
   Initiatives proposing integrated services in existing schools will be prioritized using two principles:
   i. Increase in sector and jurisdiction utilization and
   ii. impact of proposed integrated services on the community

Albert Infrastructure will review bonus points in the Provincial Prioritization Process for multi-use facilities.

STEP 9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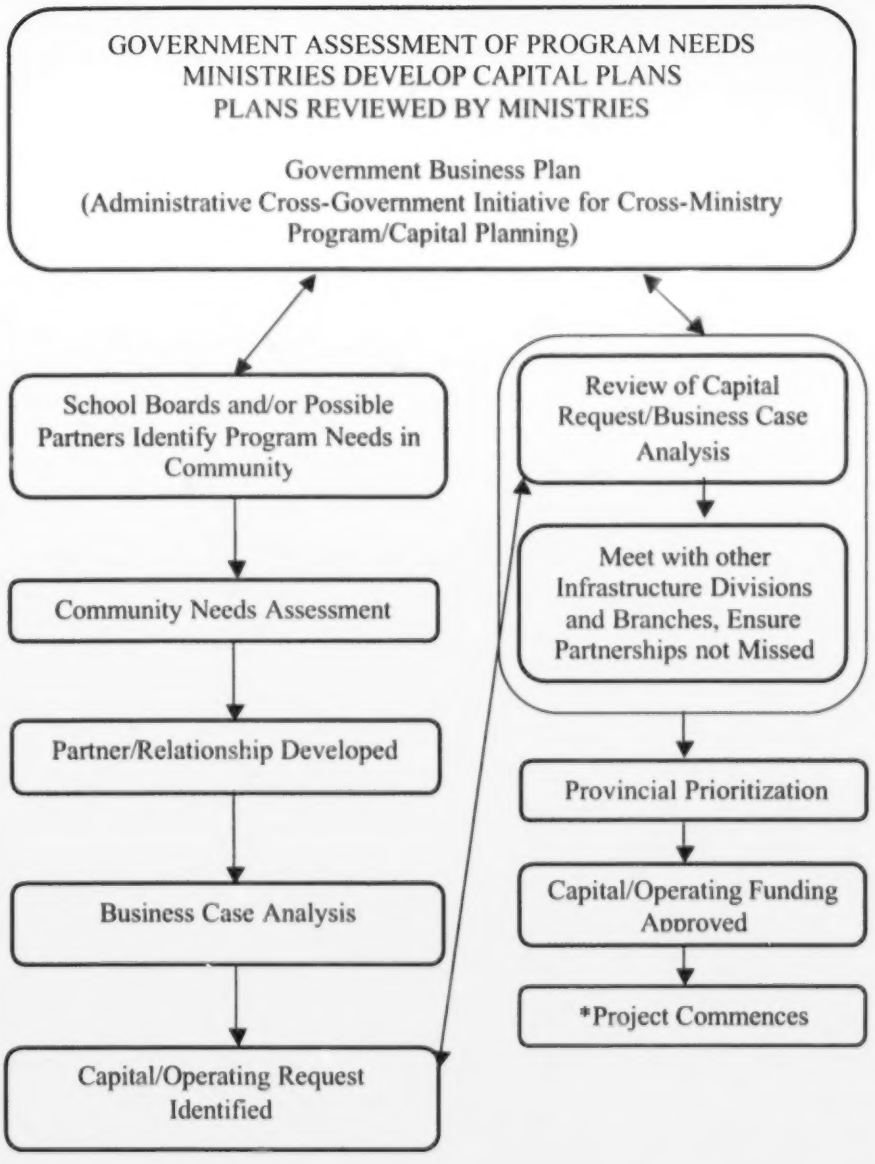
Capital/Operating Request Identified
Review of Capital Request/Business Case Analysis
Meet with other Infrastructure Divisions and Branches, Ensure Partnerships not Missed
Provincial Prioritization
Capital/Operating Funding Approved

Capital and operating funding will be approved within the cycle of 3-year Capital Plans.

STEP 10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Business Case Analysis
Capital/Operating Request Identified
Review of Capital Request/Business Case Analysis
Meet with other Infrastructure Divisions and Branches, Ensure Partnerships not Missed
Provincial Prioritization
Capital/Operating Funding Approved
*Project Commences

* Funding is allocated to School Board and partners and the project proceeds.

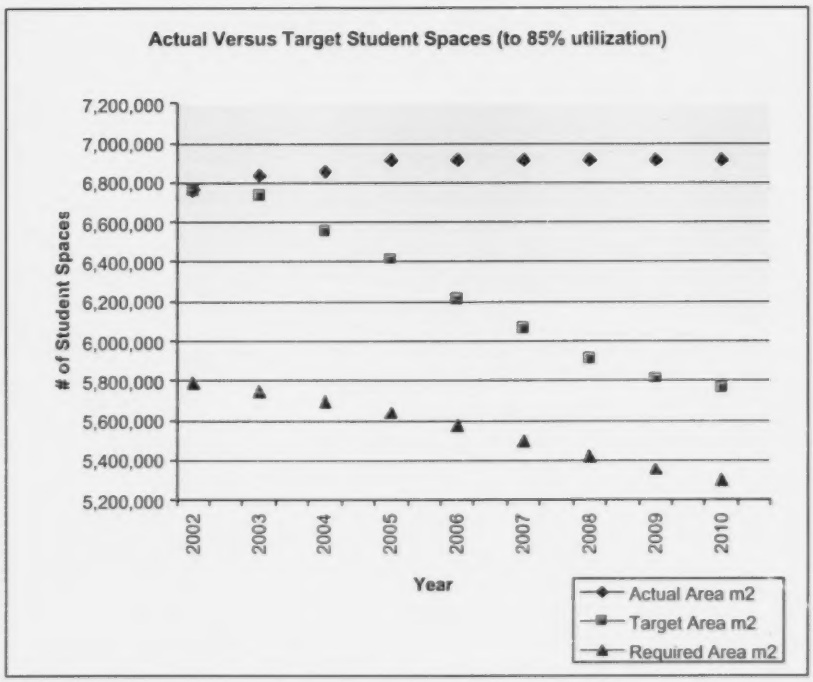
SUBCOMMITTEE RECOMMENDATIONS

The subcommittee recommends that:

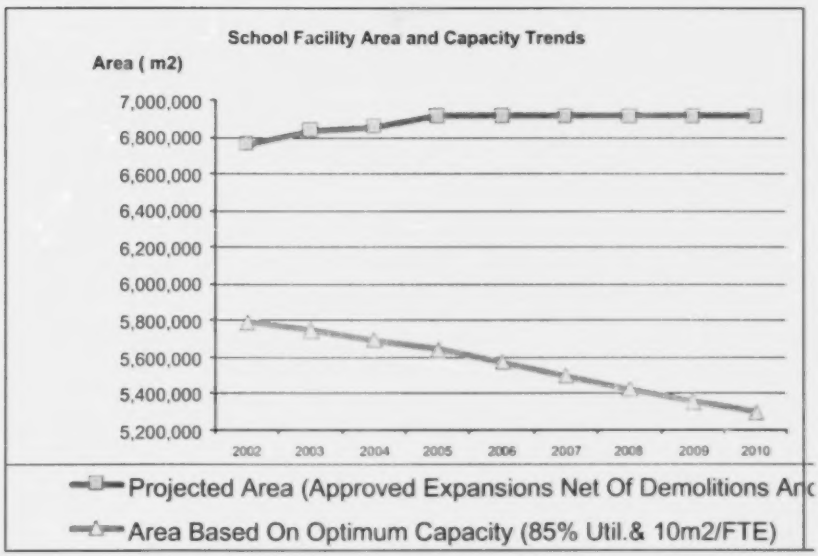
1. The Municipal Government Act (MGA) is revised to allow approved integrated services on Reserve Land.
2. Government adopt a framework for review of possible public partnering in multi-use facilities that begins at the Ministerial level.
3. An administrative cross-government initiative is developed for cross-ministry program/capital planning.
4. That Alberta Infrastructure, Learning Facilities Branch host the process of integrated service approval through Business Case development and capital plan submissions.
5. Alberta Infrastructure develop criteria that address capacity exemptions for approved integrated services in school buildings.
6. Government acknowledge and recognize the increased use of school facilities beyond the school day and school year for non-profit community use and that Plant Operation and Maintenance funding needs to reflect this increased use.
7. A mechanism be put in place to address the capital and operating needs of approved integrated services currently operating in schools.

ATTACHMENT A

Although enrolments will decline, this information does not address the issue that some urban and rural areas continue to have high growth and may require new schools.



ATTACHMENT A (Cont'd)



ATTACHMENT B

Programs	Capital	Preservation	Plant Operating & Maintenance	Program Operating
	Initial Start-up Renovations >$100,000	*Renovations <$100,000*	*Day-to-Day (Building Related)*	*Day-to-Day ,Program Related)*
Operations	*New*	*Current and New*	*Current and New*	*Current and New*
K-12	Alberta Infrastructure	Alberta Infrastructure	Alberta Infrastructure	Alberta Learning
Pre K Education	School Board/Program Agency	School Board/Program Agency	School Board/Program Agency Alberta Infrastructure	School Board/Program Agency
Post-Secondary	Alberta Infrastructure (Portion of Funding)	Alberta Infrastructure (Portion of Funding)	Alberta Infrastructure (Portion of Funding)	Alberta Learning/Post-Secondary Institution
Municipal Services	Municipality	Municipality	Municipality	Municipality
Municipal Affairs (Department)	Alberta Infrastructure	Alberta Infrastructure	Alberta Infrastructure	Municipal Affairs
Alberta Health and Wellness	Alberta Infrastructure	Alberta Infrastructure	Alberta Infrastructure	Alberta Health and Wellness
Regional Health Authority	Alberta Infrastructure	Alberta Infrastructure	Alberta Health and Wellness	Alberta Health and Wellness
Children's Services	Alberta Infrastructure	Alberta Infrastructure	Alberta Infrastructure	Alberta Infrastructure
Human Resources and Employment	Alberta Infrastructure	Alberta Infrastructure	Alberta Infrastructure	Human Resources and Employment
Community Development (Department)	Alberta Infrastructure	Alberta Infrastructure	Alberta Infrastructure	Community Development
Community Group	Community Group/School Board	Community Group/School Board	Community Group/School Board	Community Group
Agriculture, Food and Rural Development	Alberta Infrastructure	Alberta Infrastructure	Alberta Infrastructure	Agriculture, Food and Rural Development
Seniors	Alberta Infrastructure	Alberta Infrastructure	Alberta Infrastructure	Seniors
Justice and Attorney General	Alberta Infrastructure	Alberta Infrastructure	Alberta Infrastructure	Justice and Attorney General